

Knowledgebase > SalesPad > EDI > EDI 940 - Warehouse Shipping Order

EDI 940 - Warehouse Shipping Order

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Overview

The EDI 940 Warehouse Shipping Order transaction is used to instruct remote warehouses to ship sales orders. It is commonly used by a seller, such as a manufacturer or wholesaler, to authorize a warehouse to ship to a buyer, such as a retailer. The 940 may also be used to confirm a shipment, modify a shipment, or cancel a previous shipping order. The 940 transaction instructs the warehouse on what to ship, how much, and when.

Prerequisites

Before continuing with the EDI 940 configuration, make sure EDI is properly configured in SalesPad by reviewing the following documentation:

- EDI Installation
- EDI Processing
- Data Cross Reference
- Business Object Mapping
- EDI Server Connection Setup
- EDI Trading Partner Setup Steps

Data Cross Reference

Select the EDI tab on the ribbon and open the Data Cross Reference screen.

Data Cross Reference ×								
Close 📑	📑 Close 😂 Refresh 🛛 🛃 Save							
Partners:	Partners:							
🕂 New	📲 New 🔻 📄 Copy 💥 Delete 🛛 🕞 Export Selected 🔄 Import 📧 Import Into Selected							
Trading Part	ner ID	Partnership	EDI					
RBC		RBC	R a c 940					
000ALLCERT Warehouse 940 Warehouse Shipping Order								

Click the New button to add a new trading partner and set the following columns:

Column	Value
Trading Partner ID	Trading partner ID from the EDI order header, such as 000ALLCERT
Partnership	"Warehouse"
Customer Num	GP customer number (optional)
Warehouse	Sales document warehouse/location (optional)
EDI	940 Warehouse Shipping Order

Make sure the new trading partner is selected and then fill out the following mapping tabs as needed:

- Addresses
- Items
- Units of measures
- Currencies
- Payment terms
- Shipping methods

Save all changes and close the Data Cross Reference screen.

Business Object Mapping

Select the EDI tab on the ribbon and open the Business Object Mapping screen.

🍓 940 - 940 🗙						
📑 Close 🛛 🖓 Refresh 🛛 📙 Save						
Transactions:						
🖶 New 📄 Copy 💥 Delete 🛛 🔚 Export Selected 🔄 Import 🔞 Update All Mappings						
Mapping Name	Provider	EDI	EDI Description			
R B C 940	RBC	RBC	R 8 C			
940	SPS Commerce	940	Warehouse Shipping Order			
▼ ✓ Mapping Name Contains 940						

Click the New button to add a new transaction and set the following columns:

Column	Value
Mapping Name	Name of the 940 transaction mapping
Provider	SPS Commerce
EDI	940
Schema Name	StockTransferOrders
Direction	Out
Document Type	Sales Document
Document Subtype	Sales document type and ID in Dynamics GP, e.g. "ORDER WMSORDER"
Trading Partners	Trading partners to which the mapping applies (trading partners are configured on the Data Cross Reference screen)

Save all changes and close the Business Object Mapping screen.

Security Editor

Open the Security Editor by going to Modules -> System -> Security Editor and make sure the Sales Document EDI 940 and Sales Document EDI 940 By Warehouse plugins are enabled. Update sub-securities as needed. Save all changes, log out, and log back in for changes to take effect.

Security							
-	Select All Select None 🔂 Copy From						
Ăc	ce	Name					
		R 0 ¢ 940					
	v	Sales Document EDI 940*					
	1	Sales Document EDI 940 By Warehouse*					
×	1	Name Contains 940					
Sales Document EDI 940 (Can Run From Service)							
✓ Misc							
Review Batch							

Review Batch - When forwarding through workflow, sales documents will be sent to this batch if the EDI transaction fails.

Sales Document Entry

Sales Document EDI 940

Open the sales document and select the EDI 940 - Warehouse Shipping Order plugin from the Actions menu to process an EDI 940 transaction.

(ORDER) OR	D1012 ×					
📑 Close 🛛	Save 🍃 Print		🥵 Fulfillment 🛛 🚡 Run Script 🛛 📲 Split Sales Docume	ent		
Document Prop	erties		Configure Actions			
Document #:	ORD 1012	0	Update MO	-		
Customer #:	000011	-	Add Customer Default Items			
Cust PO:		-	Add Item			
Req Ship:	11/16/2023	.	🙀 Add Rental Item (Beta)			
Ship Method:	UPS GROUND	🚽 🚽 Aggregate Pricing				
Whse:	WAREHOUSE	Attach Sales Line to Manufacturing Order				
Currency:	Z-US\$	٩	Attach Sales Line to PO			
		÷	Auto Item Conversion			
		4	EDI 940 - Warehouse Shipping Order			
		P	Avatax Commit Tax			
		4	Back			
Line Items No	otes Addresses Ho	G	Blanket Order Invoicing	Re		
🙀 New 🙀 Delete 📑 Insert			Blanket Order Release			

The EDI 940 - Warehouse Shipping Order window will open, allowing review of the EDI 940 transaction details before generating and sending the EDI document.

ど EDI 940 - Wareh	ouse S	Shipping	Order				- 0	23
Properties:								
Sales Doc Num:	Sales Doc Num: ORD1012							
Customer PO Num	1:							
Shipping Method:		UPS GR	OUND					Ŧ
Delivery Date:		11/16/2	2023					Ŧ
Ship To Address C	Code:	SHIPPI	NG					
940 Destination:		000ALL	CERT					-
Line Num	Item N	lumber	Item Description	Quantity	Qty Backordered	Unit Of Measure	Unit Pr	ice
16,384	16,384 <u>A100</u>		Audio System	10	0	Each	39.	95
						Send	Cance	

Select the 940 Destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.



Sales Document EDI 940 By Warehouse

Open the sales document and select the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin from the Actions menu to process an EDI 940 transaction.

(ORDER) ORD1012 ×	
📑 Close 🛛 🗦 Save 🛛 🍃 Print	🔲 🥵 Fulfillment 🛛 🚡 Run Script 🛛 📲 Split Sales Document
Document Properties	Mark Packages As Historical
Document #: ORD1012	P PayFabric Authorize
Customer #: 000011	P PayFabric Capture
Cust PO:	PayFabric Charge
Reg Ship: 11/16/2023	a Payment
Wheel	EDI 855 - Order Acknowledgement
Currency: 7-US\$	Print Labels
	Purchase Order Generation
	Receivables Scheduled Payments (Beta)
	EDI 940 - Warehouse Shipping Order (By Warehouse)
	🛞 Retrieve PayLink
	Cales Document Convert To BOM
Line Items Notes Addresses Ho	🛛 🏨 Sales Document Get Tax
🙀 New 🙀 Delete 📑 Insert	📲 Sales Document Manual Split

A prompt may display that no partners have been set up for the partnership type. If so, open the EDI Data Cross Reference screen and make sure the Warehouse column is set for the trading partner. Save all changes and run the plugin again.



The EDI 940 - Warehouse Shipping Order window will open allowing review of the EDI 940 transaction details before generating and sending the EDI document.

Select the 940 destination and click the Send button to send the warehouse shipping order. SalesPad will display a prompt for whether the transaction was successful.

Sales Document Workflow

The EDI 940 - Warehouse Shipping Order and EDI 940 - Warehouse Shipping Order (By Warehouse) plugins can be configured to run automatically in sales document workflow. They should be attached as the Plugin for whichever queue should trigger sending the EDI document. For example, in the below screenshot, the EDI 940 -Warehouse Shipping Order plugin will run when a sales order is forwarded out of the NEW ORDER queue, and the EDI 940 - Warehouse Shipping Order (By Warehouse) plugin will run when a sales order is forwarded out of the STAGING queue.

Workflow Queues							
🔣 New Queue 😸 Delete Selected Queues 🤱 Resequence Queues							
Seq 🔺	Queue	Button Caption	Print?	Plugin			
10	NEW ORDER	Release		Sales Document EDI 940			
20	STAGING	Release		Sales Document EDI 940 By Warehouse			
30	PACKING	Release					

Note: The EDI 940 - Warehouse Shipping Order window will not be displayed when processing the EDI 940 transaction via workflow, but the transaction will be audited to the sales document audit log.